

Philips Global Beauty Index 2017

What is the global beauty state of mind?

FINAL REPORT



Introduction

Over the past three years Philips has conducted its Global Beauty Index, a research project aimed at identifying modern women's attitudes towards beauty, from the personal (daily routines, personal beauty perceptions, beauty mistakes, and beauty rituals and behaviours) to their feelings on the industry as a whole and hopes for the future. Building from 9,000 women in 2015 to over 11,000 today, the Beauty Index serves to offer a view of the changing relationship women across the world have with beauty.

Our initial research, in 2015, found that women were keen to transcend their conception of beauty beyond the purely superficial, expanding the definition past looking beautiful to *feeling* beautiful – whether that be by taking up exercise, healthy habits, or finding more diverse images of what beauty can be. At this point it was clear that although the impetus for change was present, women were also finding it hard to move past the narrow representations of beauty which they feel their culture promotes. Women wanted to see more flexibility in the role that beauty plays in their life, allowing them to experiment with what feels beautiful to them, rather than feeling pressured to conform to an ideal.

This research developed into the 2016 report, which expanded the number of countries and women surveyed, further looking at how pressure from culture and society shapes the way women think about their own beauty. Social media and the rise of the 'selfie' were introduced to ascertain to what degree these new trends break down beauty barriers through increasing access to diverse images, or serve to merely reinforce existing norms. We found that women were associating their idea of beauty intrinsically with health, and happiness, demonstrating a need for *looking* beautiful to start with *feeling* beautiful. Confidence grows on a foundation of health and beauty.

The link between beauty and health forms the crux of this year's research, where we posit that women today make their beauty decisions with a healthy mind. That is to say, they are concerned not only with surface results and efficacy, but with products which help cultivate a deeper sense of wellbeing. We revisited the pressure that women feel from society – and often, their partners and peers – evaluating how this continues to progress through 2015 to present day.

By developing these conversations on beauty, Philips aims to better understand the needs and desires of women across the world, in order to continue delivering meaningful innovations that work. Over the past three years we have listened to how women think, feel and engage with beauty, adapting our research as necessary to ensure that we shape the industry for the better today, and into the future.

Research approach

The data, findings and insights in this report are based on a combination of secondary and primary research. In order to support and further explore the findings from our own primary research we gathered trends, news and reports from a variety of sources, including trend database Canvas8, to understand current beauty industry trends and perceptions. Specific sources are cited throughout the report.

As in our two previous research projects, we conducted an online survey in partnership with Norstat, a full-service data collection agency, from 8 May 2017 through 24 May 2017. The study reached a global sample of 11,132 women aged 18 and over across 11 countries: USA, UK, France, Germany, Poland, Russia, Turkey, China, Japan, South Korea and India. The sample for each country was collected to be representative of each country.

The margin of error for the total global sample is +/- 1% at the 95% significance level, and +/- 3% at the local market level.

Sample Breakdown:

Total sample n= 11,060 (Global)	
Country	Total surveyed
United Kingdom	n=1,002
France	n=1,007
Germany	n=1,013
Poland	n=1,012
Russia	n=1,001
China	n=1,020
Japan	n=1,000
South Korea	n=1,000
India	n=1,005
Turkey	n=1,000
USA	n=1,000

Executive summary

The third annual Philips Beauty Index continued to see trends emerge in women’s relationship with beauty, and how the beauty industry can help them be the best version of themselves – on both the inside and outside.

This year we uncovered a number of findings that revealed the beauty evolution we’ve seen so far, as well as an idea of what’s to come.

COULD IT BE THE END OF BEAUTY STEREOTYPING?

- **89% of women around the globe believe that there are lots of ways to be beautiful.** *There is no single, universal definition of beauty.*
- **More women find themselves beautiful;** the increase we saw in 2016 continues in 2017, with a 9-point increase from 2015, when only 51% of women considered themselves beautiful, to 2017, when 60% of women considered themselves beautiful. *Along with this increase, we see that 70% of women believe beauty is something you define for yourself – not something decided by someone else.*

THERE IS A GROWING LINK BETWEEN INNER HEALTH AND OUTER BEAUTY

- **Women increasingly agree that being healthy is more linked to confidence than is looking beautiful.** Over 2016 and 2017, women rate the number one contributor to feeling confident as being healthy, with an increase from 2016 (71%) to 2017 (77%). Interestingly, looking beautiful has decreased from 29% in 2016 to 26% in 2017. *When women feel good on the inside, they project confidence on the outside.*
- **Health (especially mental health) and beauty are strongly intertwined.** Women consistently turn to other aspects to define their sense of beauty: 89% agree that having a positive mindset is important to how they define their sense of beauty, 85% say feeling emotionally balanced is important, and 81% say being physically fit is important. *A woman’s sense of beauty is so much more than how she looks.*

THE PRESSURE TO LOOK BEAUTIFUL

- **At the same time, women continue to feel pressure from the outside world (society, media, peers) to look beautiful.** More women in 2017 said they feel some or more pressure to look beautiful (63%) than did in 2016 (57%).
- What’s the source of this pressure? While over half of women agree that the beauty industry (61%) and celebrities (58%) put pressure on women to look a certain way, **women put pressure on themselves to always look beautiful.** In fact, ‘wanting to look my best for myself’ comes in as the biggest driver of pressure (54%).
- **Half of women (50%) admit they feel uncomfortable in situations where they are expected to look a certain way.** But this also means that **50% don’t feel uncomfortable**, feeding into the notion that while women can thrive on compliments they receive if they ‘are looking the part on someone else’s terms’, they are also not necessarily always seeking affirmation from others.

ASPIRATIONAL BEAUTY AND ROUTINES

- **Aspirational beauty is a beauty that is rooted in confidence** and goes much deeper than just flawless beauty – **confidence is not built by looking beautiful!** Only a quarter of women put looking beautiful in their top three confidence builders. *Being healthy (77%), happiness (73%) and self-respect (57%) were seen as the biggest confidence builders.*
- **Feeling more confident, and looking and feeling more beautiful for themselves are the key drivers for maintaining a daily beauty routine.** Beauty routines are *not* conducted to impress other women, to gain acceptance, to get ahead at work or to attract potential partners – they are solely for the person conducting the routine.
- **Beauty routines have changed in the last five years:** Women have added more beauty components, more wellbeing components, and are also spending more time on their beauty routine. They are also seeking out more beauty and wellbeing advice from social media and bloggers, and are open to incorporating new products that solve issues they have – as long as they are effective and efficient.
- **71% of women feel more beautiful when they have time to pamper themselves.** Taking care of yourself and taking time for yourself makes women feel good – and when women feel good on the inside, they feel like they look good on the outside.

This report delves deeper into the above themes – we hope you enjoy it!

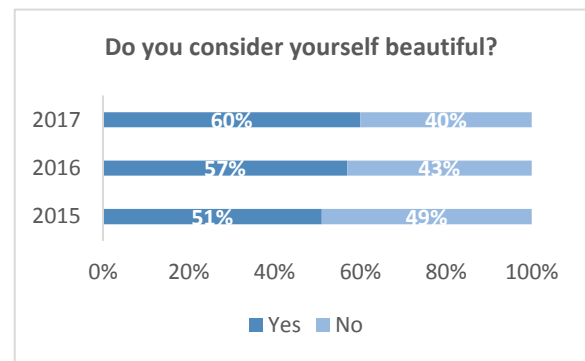
Chapter 1 – The Diverse Beauty Consumer

Women today equate outer beauty with inner wellbeing, but pressure to look beautiful still weighs heavy.

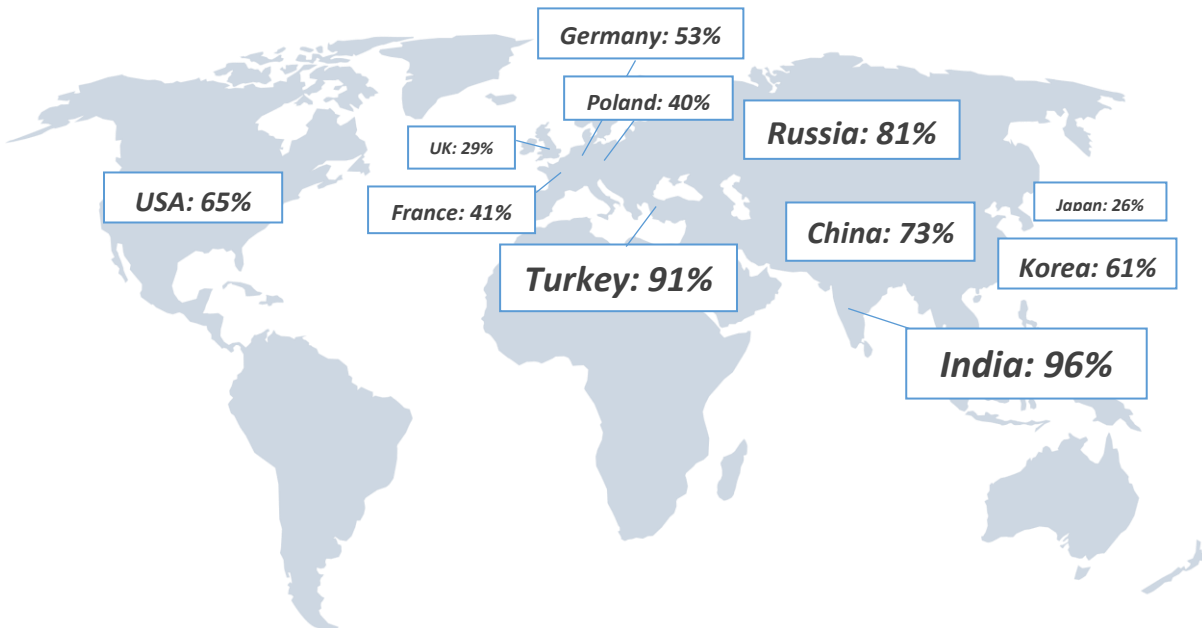
In 2017, more women consider themselves to be beautiful than did in 2015 and 2016, and nine in 10 believe there are lots of different ways to be beautiful.

When the Beauty Index was initially launched in 2015, only about half of women considered themselves to be beautiful (51%). In 2016, this figure rose to 57%, and in 2017, it rose again, to 60%.

To see this figure rise by 9 points over the years is incredibly encouraging, and reflects women’s healthier mind-set towards their self-image.



WHERE IN THE WORLD DO WOMEN CONSIDER THEMSELVES MOST BEAUTIFUL?



More than one definition of ‘beautiful’

This uptick in the percentage of people who consider themselves to be beautiful may also be attributed to the fact that nine in 10 women around the world (89%) agree that there are lots of ways to be beautiful, a statement that the beauty industry is responding to by featuring more diverse kinds of beauty, providing more customisable products, and proving a welcoming shopping experience.

In addition, 70% of women believe that beauty is something you define for yourself. With changing definitions of beauty and a rulebook of what’s beautiful made up by women themselves, it is an exciting

time to see where the beauty industry will respond, as well as how women’s perceptions of beauty change in the future. With a growing emphasis on beauty coming from within, and manifesting itself when women are happy and healthy, could it even be the end of beauty stereotyping as we know it?

More than skin deep: A healthy mind-set encourages beauty from within, but are beauty companies keeping up?

In 2017, women are interested not only in being healthy, but also in cultivating a healthy beauty mind-set and taking care of their mental health, which in turn helps them feel more beautiful. Whether it be prioritising eco-friendly (72%) or organic (70%) beauty products, or feeling emotionally balanced – 85% consider this important to defining their sense of beauty, along with 89% who attribute a positive mind-set to their definition of beauty, and 81% attribute being physically fit to this sentiment. Indeed, beauty is increasingly focused on incorporating more than the superficial.

According to [cosmeticsdesign](#): “More than ever before, consumers are turning to the beauty industry to help maximize physical, mental and emotional balance to support a healthy lifestyle. As the beauty and fitness industries collaborate in 2017 to strengthen their appeal to the active consumer, cosmetics companies are focused on formulations that provide solutions to this target audience through helping active beauty lovers achieve a healthy lifestyle.”

Women are increasingly looking to wellness and beauty devices to help them maintain a healthy outlook – and appearance.

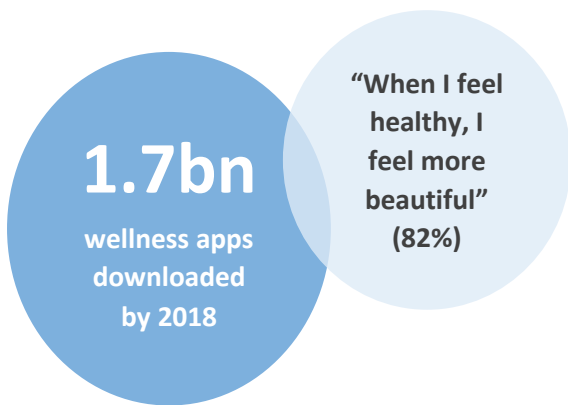
PWC forecast that ‘wellness’ apps will have been downloaded over 1.7 billion times by the end of this year¹, and fitness trackers have more than doubled in use in the US from 2014 to 2016², clearly showing that there is little hesitation in adopting technology in order to monitor and improve health.

New app Mindbody gives users the option to book their ‘best day, every day’ by offering a selection of workouts, wellness and

beauty treatments within the same system. Making no distinction between, for example, a boxing class and a massage, Mindbody taps into the way that modern women think about health and beauty: that is, without division.

Health and wellbeing are becoming more intrinsically linked to beauty than ever before. But, is the beauty industry itself keeping pace? Fewer than one in four women globally believe that the beauty industry is more focused on overall wellbeing than appearance than it was in the past (23%).

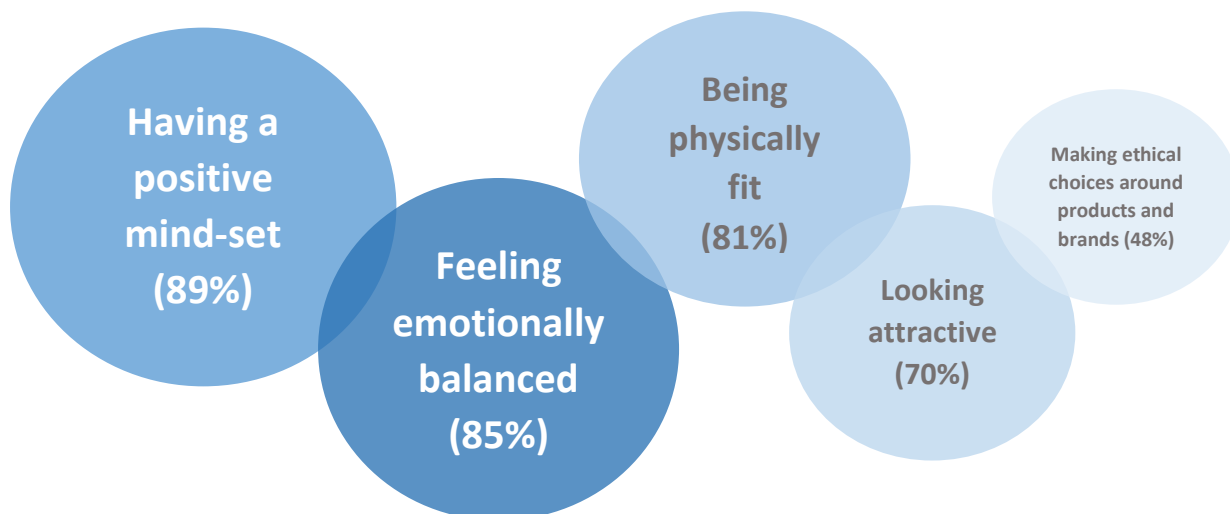
In fact, 31% still believe that the beauty industry is not at all focused on wellbeing – highlighting a pressing need for beauty companies to respond to what women want – and need – to be their healthiest, most beautiful selves.



¹ <http://www.economist.com/news/business/21694523-mobile-health-apps-are-becoming-more-capable-and-potentially-rather-useful-things-are-looking>

² <https://newsroom.accenture.com/news/consumers-use-of-health-apps-and-wearables-doubled-in-past-two-years-accenture-survey-finds.htm>

How important are these in how you define your sense of beauty?



Interesting market differences:

- Only just over half of women in the UK consider looking attractive important (52%), whereas 83% of those in Russia do
- In India (77%) and Turkey (66%) making ethical choices about beauty products and brands is important, although overall 48% of women say it defines their sense of beauty

Market Focus: India

Almost all women in India consider themselves to be beautiful (96%). However, half of women here also agree that **beauty and physical appearance are one and the same (49%)**. This feels at odds with the more holistic beauty activities which women in India tend to favour – they are the most likely to have incorporated yoga and meditation into their daily routine for example.

Instead, it seems to suggest that by cultivating a sense of inner peace and emotional calm the benefits will be visible externally. Women in India are the most likely to say they **feel less pressure to look beautiful now than they did five years ago (42%)**. Although they may seem to equate beauty with looking good, they don't seem to ascribe to a fixed definition of how that should be. By believing in more fluid notions of what beauty looks like – while agreeing that it is in fact, defined by *looks* – Indian women enjoy and benefit from the maintenance of their inner selves to feel beautiful outwardly. Indeed, 83% of Indian women consider beauty to be something they define for themselves.

Despite seeing beauty as rooted in health, most women still feel under pressure to look beautiful – even if only for themselves.

Women around the world are more likely to feel either some or a lot of pressure – from society, the media, or peers – to look beautiful (63%) than to not feel any pressure to look beautiful (37%).



- Although women in Japan are least likely to think of themselves as beautiful – three in four don't (74%) – they are most likely **not to feel any pressure** to look beautiful, with half saying they don't feel any pressure (50%) and only 7% saying they feel a lot of pressure.



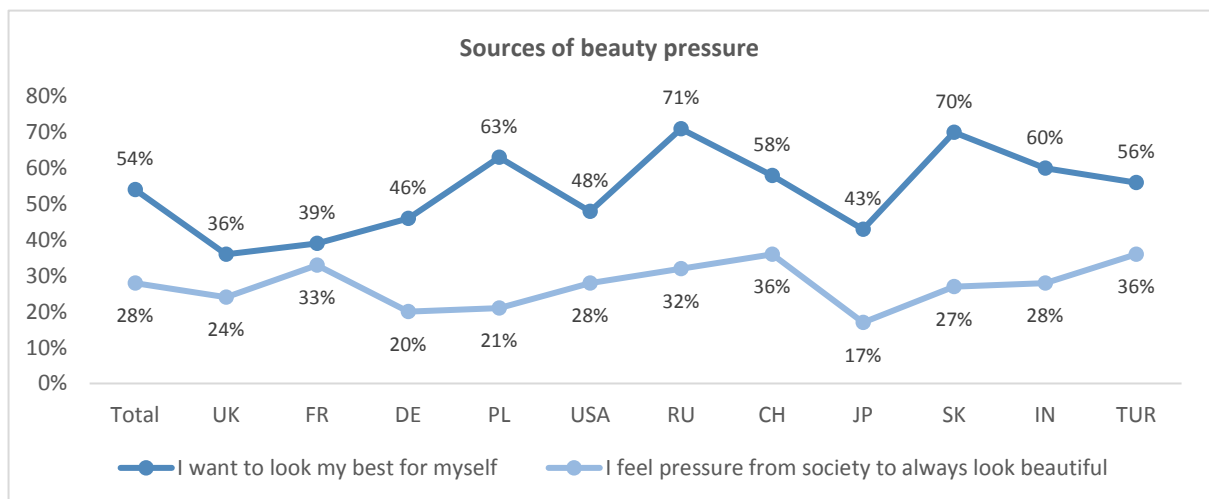
- Women in the US are most likely to **feel a lot of pressure** – one in five says so (19%). A similar amount of American women say they feel pressure to always look beautiful because the beauty industry makes them feel inadequate (21%).



- In China, women are most likely to **feel more pressure than they did five years ago** (36%), perhaps due to the emphasis they place on looking good in the workplace – one in three feel pressure to always look beautiful because it is expected of them at work (33%).

Although most women put pressure on themselves to look beautiful, it may be due to the fact that women tend to feel beautiful when they feel confident. By wanting to look the best for themselves, they simultaneously may increase self-confidence.

Despite only one in four women saying they don't feel any pressure to always look beautiful (26%), for the other 74%, this pressure to be attractive comes from within: Over half say they want to look their best for themselves (54%), with far fewer stating societal pressure as the reason (28%).



Again, there are some key market differences:

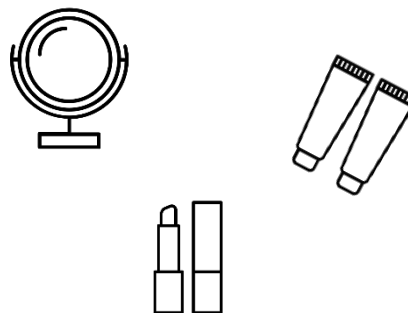
- Women in South Korea are the most likely to feel pressure to always look beautiful – 90% gave at least one reason. However, they were most likely to want to look their best for themselves (70%).
- In Russia, one in three women feels under pressure from the beauty industry to look their best (33%), whereas the global average is one in five (20%).
- For Indian women, their partners, families or friends are the reason why they feel pressure to look beautiful (34%).

So, WHAT DO WOMEN WANT FROM THEIR BEAUTY PRODUCTS?

Effectivity (86%)

Easy/convenient to use (85%)

Eco-friendliness (72%)



In essence, women are likely to prioritise buying beauty products which will be effective and deliver results, and easily fit into their routine.

It is interesting however, that eco-friendly is the third most desired quality (72%), and organic products (69%) have the same amount of interest as those with extensive research programmes behind them (70%). Where labels denoting a product’s ecological or organic credentials would once have placed it in a niche market – possibly outside the typical high street shopping experience – now women see these qualities as ‘need to have’, not ‘nice to have’.

Cruelty-free (65%) is considered more important than high-tech or scientific ingredients (49%) when choosing beauty products, and interest in even vegan (40%) and halal (21%) products is no longer insignificant.

There are obviously some key market differences among those who prioritise halal beauty products – with the most interested in Turkey (61%), India (39%) and China (37%). However, globally, no market had less than one in ten women who stated halal products as being important to them. This demonstrates the global democratisation of beauty products, whereby concerns which were once marginalised have come to the fore.

When they want beauty or wellbeing advice, women turn to experts over journalists and celebrities.

When it comes to looking for health and beauty inspiration, advice and news, three in four women turn to experts (73%). This is more than those who turn to more traditional sources of beauty knowledge such as journalists (42%) and celebrities (51%).

They are most likely to look to the following to discover new **beauty brands and products**:

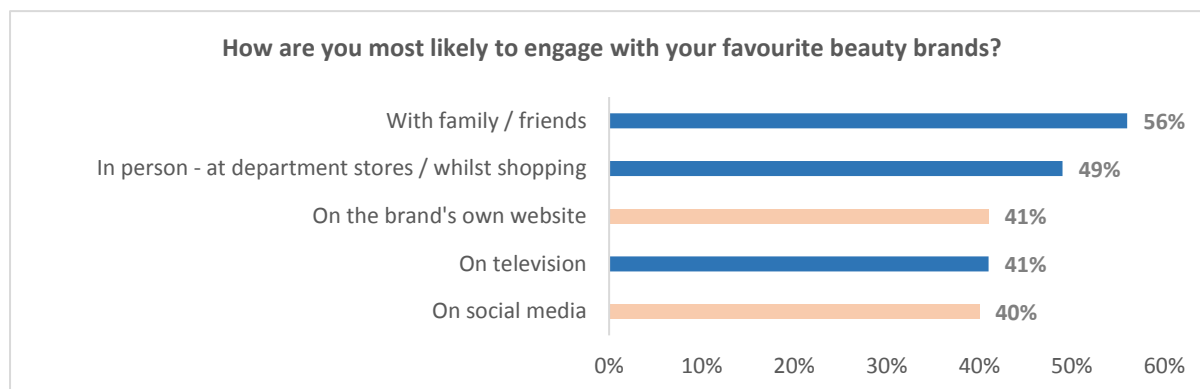
- Experts (37%)
- Bloggers/vloggers (31%)
- Celebrities (23%)

They would look to the below to learn more about **healthy living**:

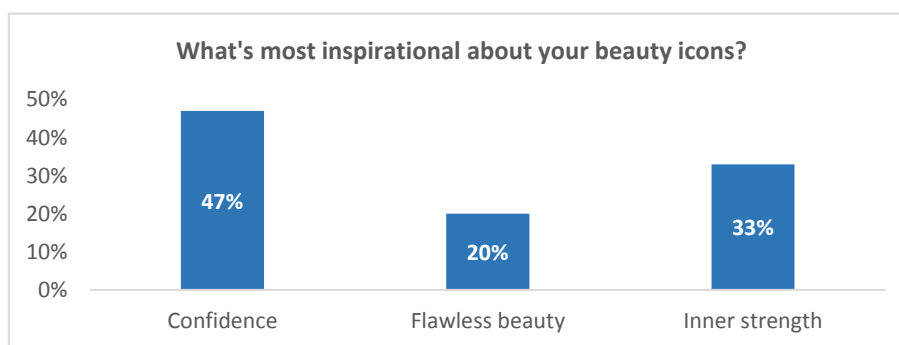
- Experts (48%)
- Athletes (26%)
- Bloggers/vloggers (23%)

Although bloggers and vloggers are a popular source of beauty information and advice, women would generally rather engage with their favourite beauty brands in person, whether that be through friends or whilst shopping.

Among the women who turn to public figures and celebrities for health and beauty advice and inspiration, women want them not to be perfectly stunning, but comfortable in their own skin.



Around half of women across the world turn to celebrities (51%) or public figures (49%) as sources of health and beauty knowledge. Women are most likely to look to these people for beauty inspiration, with 29% turning to celebrities and 21% to public figures to provide them with inspiration for new looks.



However, there is evidence that these sources of inspiration **go further than merely the superficial**: Women who find public figures or celebrities inspirational for health and beauty advice feel this way because **they are confident and comfortable in their own skin (47%)**. Only one in five stated that flawless beauty and stunning looks made these women inspirational (20%), and one in three said that the perfect combination is a natural beauty with inner strength (33%).

This supports other recent research by Philips, which delved into the meaning of beauty, and how modern women approach their beauty icons³. Through speaking to over 400 women on the Philips Beauty Lounge, C Space identified three key roles that women see their beauty role models as playing in 2017:

- Style Icon – admired for their perfection, being flawless, confident and **objectively beautiful**
- Girl’s Best Friend – **natural, attainable** beauty, with a personality that’s down to earth
- Unapologetically Me – women who **radiate self-confidence**, never being afraid to be themselves and who see beauty in imperfection

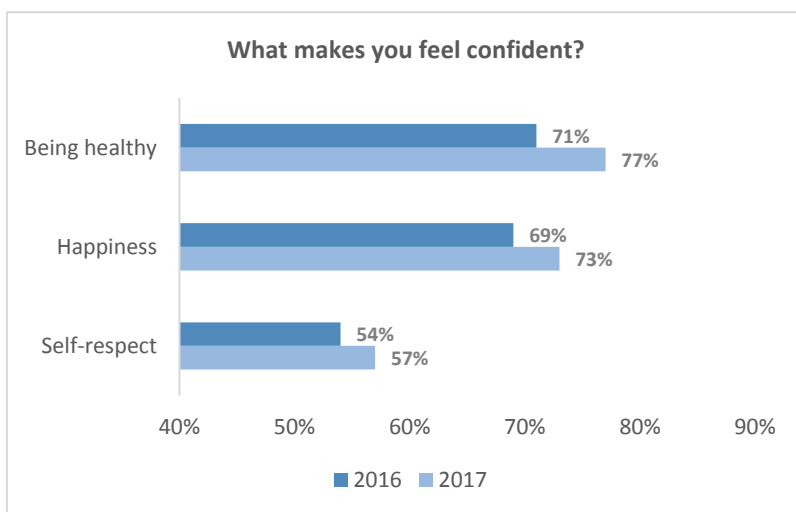
Across all three of these beauty icons, there is a commonality of these icons being confident in who they are and comfortable in their own skin. Beauty is about more than what others think of you, but when we feel confident in ourselves, we feel the most beautiful, too.

³ C Space – Meaning of Beauty

Chapter 2 – Redefining the Role of Beauty in Women’s Lives

Beauty plays an increasingly more holistic role in women’s lives, as they turn to wellbeing behaviours to increase confidence. Spending time with loved ones makes them feel beautiful.

Women are more likely to associate feeling happy and healthy with being confident, rather than simply looking beautiful.



In 2017 the following attributes are most likely to make women feel confident:

- Being healthy (77%)
- Happiness (73%)
- Self-respect (57%)

However, less than half of women globally identified these attributes as having an impact on their confidence:

- Feeling beautiful (38%)
- Being physically strong (29%)
- Looking beautiful (26%)

Women today are more interested in making sure that they *feel* beautiful (38%), than that they look beautiful (26%).

However, there are some key differences depending on country: in France, for example, only one in ten women say looking beautiful makes them feel confident (11%).

In Russia (54%) and Japan (47%) being physically strong is more important for confidence than feeling beautiful and self-respect. Only 29% of women across the world cited physical strength as giving them confidence.

Feeling more confident is the key driver in maintaining a daily beauty routine. Doing so is as much about feeling good as looking good, with women prioritising wellbeing behaviours.

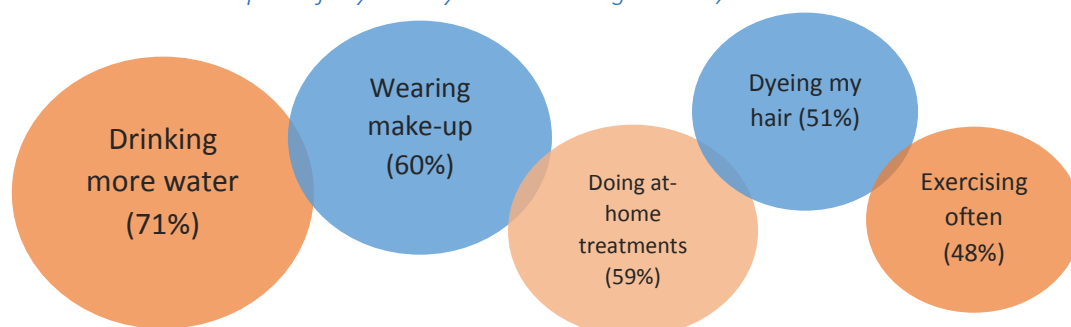
If being healthy and happy make women feel confident, it makes sense that those who maintain a daily beauty routine do so primarily to:

- Feel more confident (39%)
- Look and feel more beautiful *for themselves* (38%)
- Feel happy (35%)
- Feel healthy (35%)

This is reflected in the behaviour that women are most likely to have adopted into their routine: drinking more water (71%). Notably, this is a *wellbeing* and not beauty behaviour. This is followed by wearing make-up (60%), and performing at home beauty treatments such as manicures, pedicures and face masks (59%).

Indeed, when it comes to changes made to beauty routines in the last five years, 44% of women say they have *added* components to their routine, up from 31% in 2016, many of which are health and wellbeing habits like drinking water, exercising, and taking supplements. Many women have also removed components, by reducing alcohol, sugar, and caffeine consumption to improve their sense of health and wellbeing.

“As part of my beauty and wellbeing routine, I’ve started...”



In fact, women across the world are actually more likely to have added a wellbeing behaviour to their routine than a beauty behaviour – **94% say they have made some attempt to lead a healthier lifestyle**

Beauty behaviour callout: Pampering

Seven in 10 women (71%) feel more beautiful when they have time to pamper themselves. Taking the time to take care of yourself makes women feel great, demonstrating that beauty behaviours that make you look good can make for beauty experiences that are actually good *for* you. Whether done at home or at a salon, many women have added habits like these into their beauty routines, taking time to get massages, facials, manicures, and even going to the spa.

Feeling good is a pathway to feeling beautiful.

There are some key market differences when it comes to beauty and wellbeing behaviours.

Those in China (67%), Russia (64%) and India (52%) are all far more likely than average to get regular massages or facials. In Turkey, slightly more extreme beauty behaviours are popular – women here are three times as likely to get Botox as those globally (12%, vs. 4% globally), and one in three get laser hair removal (33%, vs. 10% globally).

On the other hand, one in five women in the UK (20%), and 18% in Japan, have not added any beauty behaviours to their daily routine.

Indeed, 15% of women in the UK say they don't have a daily beauty routine, the highest of all markets, and women in Japan are the most likely to state that their beauty routine has not changed in the past five years (41%). These two markets are also the most likely to not consider themselves to be beautiful.

It is difficult to assess whether women in these markets don't bother with a routine because they don't consider themselves beautiful, or they don't consider themselves beautiful because they don't take time to cultivate a beauty routine. Interestingly, if they are going to have a daily routine both of these markets are the most likely to have one in order to feel in control



(15% in Japan, 14% in the UK, global average of 9%).

The roles in which women feel most beautiful and in which they feel most themselves are very different.

Women say they feel most beautiful:

- As a bride on their wedding day (29%)
- As a wife or partner out on date (18%)
- Out on the town with their friends (13%)

...and they feel most themselves:

- At home relaxing (49%)
- On holiday (12%)
- As a professional at work (7%)

There is a discrepancy between when women feel most themselves and when they feel most beautiful. In fact, only 8% of women say they feel most beautiful when at home relaxing, and only 4% of women say they feel most themselves as a bride on their wedding day.

This may have something to do with the fact that half of women (50%) agree that they feel uncomfortable in situations where they are expected to look a certain way – which could be said of a wedding day. While this implies that the other half of women do not feel uncomfortable with these types of situations, it also feeds the notion that women feel beautiful if they look beautiful according to someone else.

Market Focus: Japan

Although few women in Japan admit to considering themselves to be beautiful (26%), 85% say they have a beauty routine. Among them, 43% say their routine hasn't changed compared with five years ago – a figure significantly higher than the global average of 21%.

This higher-than-average figure in Japan can be attributed to the fact that women there have extensive skincare routines. Even the most basic of skincare routines will contain seven steps!

It is also possible that they have learned a routine from a friend or family member – a concept that could very well be true, given that advice from friends or family is among the things that Japanese women say would MOST influence them to change their health and beauty routine (24% vs. 18% globally).

Beauty on someone else's terms vs. beauty on my terms

Feeling beautiful on someone else's terms often stems from situations where women feel pressured to look a certain way – such as a professional event, interview, special occasion, or their wedding day. While some women cite positive associations with this pressure – such as a confidence boost when they receive compliments, enjoyment with experimenting with new trends, and pleasure from indulging in themselves – others have a more negative connotation, such as a sense of obligation and expectation that comes with beauty on someone else's terms, or feeling inauthentic or uncomfortable in their own skin.

That said, when it comes to feeling beautiful on their own terms, women consistently feel positive. They feel beautiful in the presence of loved ones, in the presence of nature, when doing activities that they love, and when they spend time on themselves. These low-pressure experiences nurture women's sense of beauty. It is sometimes in the most unexpected of places that they say they feel beautiful, and often relate to when they are in the comfort of their own home, and when they are doing activities where they are caring for themselves.

It is in these more 'natural' habitats that women feel their most beautiful, authentic selves.

While most women seem to say that they aim for beauty on their own terms, this sentiment highlights that there is work to be done when it comes to feeling beautiful on their own terms and feeling comfortable in their own skin – much like the beauty icons they look up to.

Chapter 3 – Beauty rituals and experiences

Women aren't born knowing what their beauty ritual will be. They learn it from others – their mother, grandmother, sister, and friends – and tweak these rituals as they figure out what works for them (and what the beauty industry can offer them).

Women around the world say that their mother and their partner have had the most significant impact on their relationship with beauty.

Just as many women say that their mother has made the most significant impact on their relationship with beauty (18%) as say their partner has done so (18%).

A MOTHER'S BEAUTY IMPRINT

Women in India (37%) and Turkey (30%) say their *mother* had the biggest impact on their relationship with beauty.

Interestingly, these markets also have the highest rates of women saying they feel beautiful (96% in India and 91% in Turkey), highlighting that mothers in these markets may help cultivate women's perception of beauty.

This may also highlight a cultural difference in the way mothers talk to their daughters about beauty.

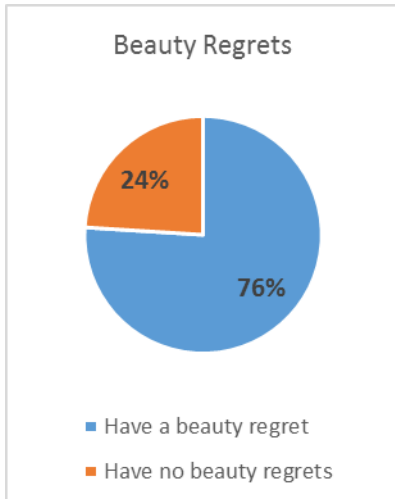
A PARTNER'S INFLUENCE

Women in Germany (31%) and France (27%) say their *partner* has had the biggest impact on their relationship with beauty. While few in these markets say they feel *pressure* from their partner to look beautiful, more women in these markets say they make the most *effort* with their appearance when going out with their partner – 22% in Germany and 25% in France, versus 18% globally. While partners may not put pressure on women to look a certain way, women appear to feel as though they would *should* look attractive for them.

Across markets, additional differences stand out:

- In **Russia**, women say **beauty brands** have the most significant impact on their relationship with beauty (21% vs. 14% globally)
- In **China**, women say their **best friend** has the most significant impact (26% vs. 14% globally)
- In **Japan** and **South Korea**, women say **television** has the most significant impact (22% in each market, vs. 9% globally).

Women confess their beauty mistakes as their relationship with beauty evolves.



While one in four women around the world say they have no beauty regrets (24%), the remaining three in four women (76%) say their biggest regret is overexposure to the sun (15%) and not taking care of their skin (14%) – this, despite the beauty advice that many women cited around the importance of taking care of their skin!

Across markets, the differences in beauty regrets vary:

- Women in the US are the most likely to regret a perm (11%)
- Women in the UK are the most likely to regret over-plucking their eyebrows (12%)
- Women in Russia are the most likely to regret sleeping in their makeup (13%)

Meanwhile, women in France (43%) and Germany (41%) are most likely to say they have no beauty regrets whatsoever. Women in South Korea (10%), Turkey (13%), and China (13%) are the least likely to feel this way.

Mothers and grandmothers are most frequently cited as having given the best beauty advice, which typically revolves around caring for their skin.

When asked to share the best piece of beauty advice they’ve received and from whom, many women cite skincare advice from their mother – whether it’s related to using creams, washing their face so it’s free of makeup and pollution, or wearing regularly sun cream.

Much of the advice that women shared focused on the close tie between health and beauty, highlighting the close connection between how you feel internally and how you look externally.

Key beauty advice include focus on health and wellbeing

“When you are happy, you look your best.” – Mum

“Never sleep with make up on.” – Beauty magazine

“Always take off your make up at night no matter how late home you are.” – Mum

“Drink lots of water.” – Grandmother

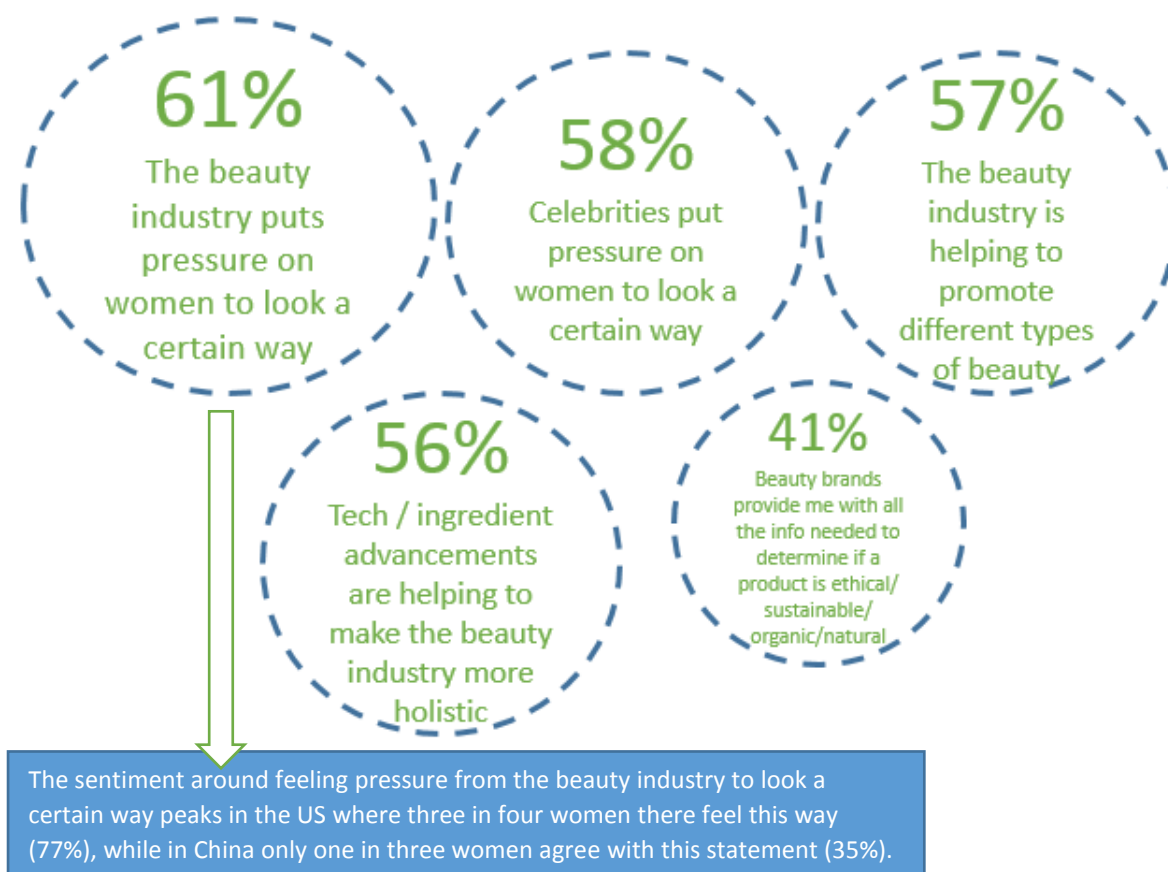
“Use natural products, [and] do yoga [and] meditations to look beautiful.”

“If you feel physically fit and healthy you look and feel more beautiful.” – Husband

Beauty and wellness are strongly interconnected, and recently, beauty has gone more than skin deep – it penetrates all the senses, and goes into how we actually *feel*. Beauty brands are responding, offering a diverse view of what being beautiful really means, ridding their products of unnecessary chemicals in favor of more natural ingredients, and opting for a more authentic message around clean beauty. The ‘new beauty’ has deemed activities like exercise, yoga, clean eating, and meditation as paths to beauty. After all, when we feel beautiful on the inside, we look beautiful on the outside.

Women continue to feel pressure from the beauty industry and celebrities to look a certain way, but they do feel as though the beauty industry is heading down a path of more holistic and diverse definitions of beauty.

Three in five women around the globe agree that the beauty industry puts pressure on women to look a certain way (61%), while just about as many women (57%) agree that the beauty industry is helping to promote diverse types of beauty.

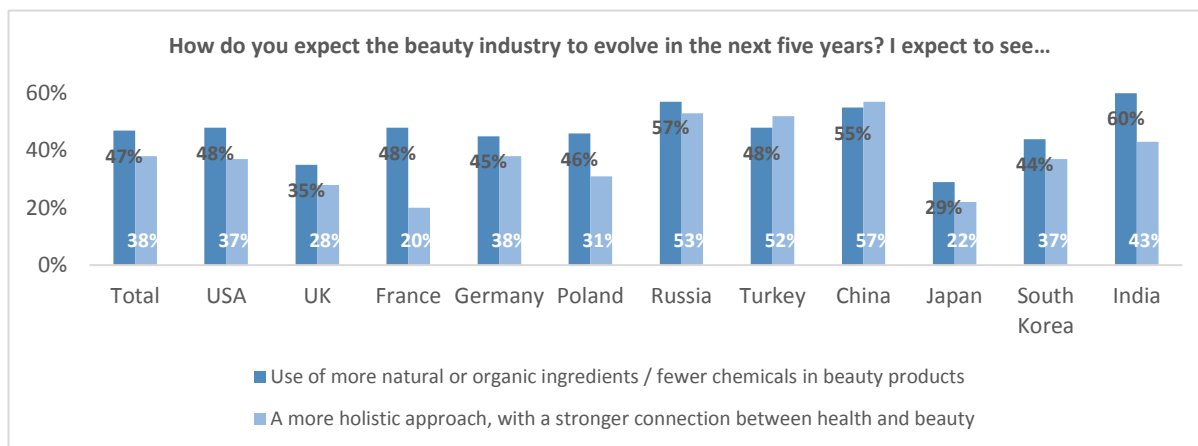


Although some women feel pressure from the beauty industry when it comes to beauty standards, they also have expectations to which they hold the beauty industry, particularly as it pertains to how the industry should evolve over the next five years.

This year, women declare a growing expectation that the beauty industry...:

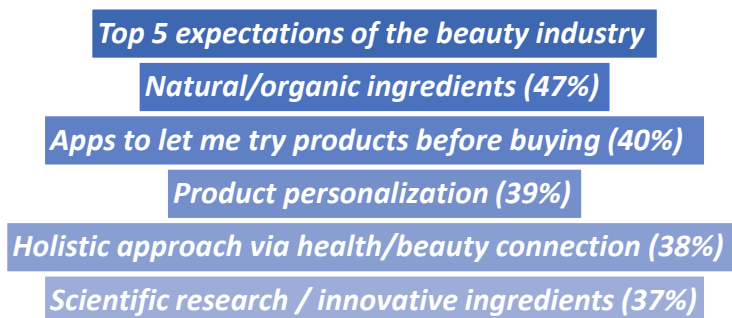
- Provide more **personalisation** in terms of beauty products (39% vs. 33% in 2016)
- Provide a more **holistic approach** to beauty, with a stronger connection between health and beauty (38% vs. 34% in 2016)

Women also expect that the products evolve. Consistent with last year's 45%, this year 47% of women said that they expect products to include more **natural or organic ingredients and fewer chemicals**. While this was the biggest way in which women around the world expect the beauty industry to evolve, it was especially high in India (60%) and Russia (57%).



Targeted products that solve issues

Personalisation in beauty products also came through strongly (39%), and is underscored by the fact that new products that solve issues that women have would most influence women to change their health and beauty routine (29%), ahead of advice from friends and family (18%) or celebrity recommendations (4%). This expectation is part of a larger trend, with studies showing that women feel frustrated by the beauty product shopping experience. Women feel as though they waste money on products that are all wrong for them, as well as a desire for a more personalised, hands-on approach to finding the best products for them.⁴



Beauty brands aren't the only ones who would see a positive effect from providing a customized approach to products – beauty consumers also benefit. Women will be able to quickly identify the right products for them when they have a personalised shopping experience – either in-store or online / via apps – which means less money and time wasted, and more time perfecting their look.

There is a high level of consistency over the past three years when it comes to the beauty tools that women around the world use.

For the third year in a row, hair tools are the most popular beauty tools that women around the globe use at home.

Hairdryers are most commonly used (79%, a 9-point increase from 2015's 70%). Nearly twice as many women use a hairdryer as use a hair straightener (40%, up from 35% in 2015), and more than twice as many women use a hairdryer as use a hair curler (31%, consistent over all three years).

Use of at-home hair removal tools, such as epilators (23%), laser hair removal tools (7%), and IPL hair removal devices (6%) has remained steady over the past three years.

⁴ Canvas8 report, 'How is customisation revolutionising beauty?', 9 February 2017

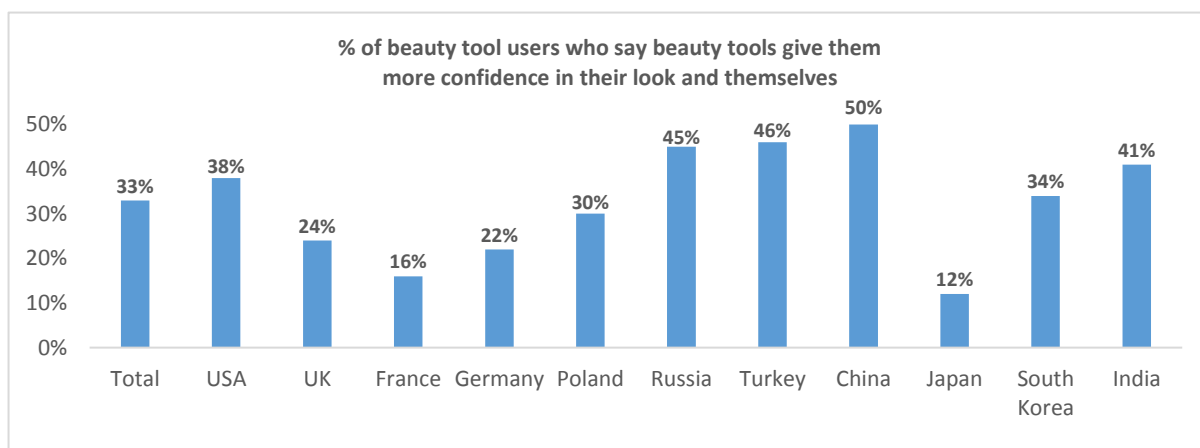
% who use at-home hair/hair removal tools	2017	2016	2015
Use any beauty tool	90%	88%	85%
Hair dryer	79%	75%	70%
Hair straightener	40%	37%	35%
Hair curler	31%	31%	31%
Epilators	23%	24%	20%
Laser hair removal	7%	5%	3%
IPL hair removal	6%	6%	4%
I don't use any beauty tools or products	10%	12%	15%

Spotlight on at-home hair removal:

Second only to the hairdryer, **France** reports the highest rate of use of **epilators** in Europe, at 40%.

But the use of **epilators** (55%), **laser hair removal tools** (29%) and **IPL hair removal devices** (18%) is highest in **Turkey**.

More women say they are using beauty tools or products, up from 85% in 2015 to 90% in 2017, which points to a growing reliance on such tools. More women also report that these tools have had an impact on their beauty routine (from 79% in 2015 to 87% in 2017), mostly because such tools allow women to achieve a desired beauty look more easily (43%).



The use of beauty tools is not solely tied to achieving a beauty look though. Tools also play a role in women’s ability to find her identity: One in three women (33%) say these tools actually have an impact on their pressure, boosting confidence not only in how they look, but also in themselves.

For women around the world, outer beauty can – and does – have a positive impact on inner wellbeing.